

Functional Requirements Document (FRD)

Project# 00495

**Project Title: Request for
Program Modification to RETM**

Date Prepared: 06/22/10

Scope:

The scope of this document is limited to the requirements to modify the Retirement Processing System (RETM) retirement master record on Standard Form (SF)-2806 (CSRS) and SF-3100 (FERS), Individual Retirement Record (IRR) to: (1) display **net** actions and not display actions that cancel or offset each other; and (2) consolidate the original and corrective actions to eliminate the creation of unnecessary line items on the IRR.

Assumptions:

RETM stores an employee's service history along with the retirement deductions in a record within RETM. When an employee separates from federal service, the record of service history and the retirement deductions are printed on a system generated SF-2806/3100, IRR.

Personnel actions are canceled or corrected through NFC's Payroll/Personnel System by either a system re-validation or through the History Correction Update Processing System (HCUP) and the results are passed to RETM. Cancellations and corrections of previous personnel actions generate volumes of unnecessary line items on the IRR resulting in the creation of unnecessary retirement cards. IRRs containing the excessive, unnecessary data are not in compliance with OPM standards, thereby requiring significant manual intervention to correct. Since the implementation of HCUP, the volume of retirement masters requiring correction has increased significantly each year.

Functional Requirements

(Completed by the NFC Project Owner before being sent to the agency.)

Payroll Systems Branch (PASB) Requirements

Not Applicable

Personnel Systems Branch (PESB) Requirements

Modify RETM as follows:

- Create Program RETM65, which will sort all RETM-ACTION-RCDs from all RETM-BASIC-RCDs by SSN, Effective Date, NOA2/NOA1, Salary, Grade, and Step. Program RETM65 will flag the actions to either be skipped ("S") and not printed on the IRR or modified ("M") to not print the Correction ('002') NOA if the key info (Salary, Grade, Step) are the same on both the original and correction actions. The first position of the Remarks-Line in the RETM-ACTION-RCD will contain the "S" or "M" flag. If the flag was changed to Keep ("K") by operations personnel using the online dialogue, no action will be taken on that record by this program.
- Modify Program RETM54 to look for the "S" or "M" flag and make changes to the

IRR. If the flag is "S", that RETM-ACTION-RCD will be skipped and not printed. If the flag is "M", the program will move "000" to the 1st nature of action code prior to printing on the IRR.

- Modify RM02200D (Retirement Action Index Screen - Inquiry) to display the flag after the Sequence Number.
- Modify RM02205D (Retirement Action Screen - Inquiry) to display the flag just before the Effective Date.
- Modify RM01200D (Retirement Action Index Screen - Add/Mod) to display the flag after the Sequence Number.
- Modify RM01205D (Retirement Action Screen - Add/Mod/Del) to display the flag just before the Effective Date. This dialogue will allow operations personnel to change the flag based on their research to affect which actions are printed on the IRR and if any change is needed to the 1st NOA on the IRR. By changing the flag setting, operations personnel will be able to adjust how the IRR is printed without having to modify the 1st NOA or delete the RETM-ACTION-RCD from the system. Valid values are space, "S", "M", or "K".

Administrative Applications Systems Branch (AASB) Requirements

Not Applicable

Web Applications Systems Branch (WASB) Requirements

Not Applicable

Human Resources Applications Staff (HRAS) Requirements

Not Applicable

Signature of SRB Chief: /s/ Cherie D. Landry

Date: 06/22/10